

Summit Professional Selling® is a comprehensive, two day course for producers interested in a practical, clear and concise roadmap to effective and efficient selling. The course tends to attract a wide range of participants, from new producers in the business for only a few years to 20+ year veterans. The newer entrants into the world of selling insurance tend to be looking for a roadmap, and a clear and proven methodology to sales success. The more experienced individuals are looking for a refresher, a validation of their strategy and practices, and for a few new angles. There is generally a great deal of positive interaction from this range of experience, and producers across the board consistently rate this course highly in their evaluations. The course covers selling from “A” to “Z,” is fast paced, highly interactive, and sends producers back to their world armed with new ideas, fresh perspectives, and a renewed sense of the importance of their job, and doing it well.

Seminar Overview / Program Content

- **Participant Objectives & Priorities**
- **Selling “Today”**
 - Why “past” techniques no longer work and why many “current” techniques have no future
 - The image you project to clients/prospects: actual vs. ideal
- **The Sales Success Model**
 - The five key areas high performing top producers have mastered
- **Self Assessment**
 - Identifying / recognizing your strengths, comfort zones and areas for improvement
- **Properly Positioning Yourself**
 - Why the marketing term “positioning” is so important for sales success
 - Positioning yourself as a partner, or trusted advisor with your prospects, clients & network
- **Sales Activity**
 - Finding the right level and proper direction
- **Our Customer**
 - Understanding buyers (from sophisticated risk managers to overwhelmed manager/owners)
 - What’s behind a buying decision?
 - Understanding buyer motivation
 - Need/pain discussion: are there issues; do you have a real opportunity to be value added?
- **Differentiating Yourself & Your Sales Offer**
 - Articulating your total offer
 - Differentiating what you are selling from competitor offers
 - Unseating incumbent agents
- **The Framework / Components of a Sale**
 - Elements of a successful sale
 - Pre-call planning & post call analysis
- **Critical Interpersonal Skills**
 - The foundation & building blocks for successful selling
 - Mastering the interaction process
- **Effective Prospecting**
 - Finding the “hot” sources & resources for leads (and how to “warm up” cooler sources)
 - Better targeting & qualifying (big 6 qualifying questions)
 - Generating referrals and building your referral network
 - The difference between leads, suspects & prospects
 - Effective networking
 - Contact management systems, tools & techniques
- **Getting to The Decision Maker**
 - Dealing effectively with “gatekeepers”
 - Successful appointment setting approaches
 - The phone as a sales tool
- **Opening The Sales Call**
 - Making the best first impressions
 - Opening model & effectively establishing rapport
- **Dealing With Objections More Effectively**
 - Handling objections in a systematic manner & strategies to minimize/overcome objections
- **Closing The Sale**
 - How and when to close
 - Recognizing buying signals
- **Effective Time Management For Producers**
 - Gaining clarity of sales priorities
 - Proper activity levels that match your book goals
 - Developing a systematic approach
- **Becoming Your Own Best Sales Manager**
 - Critically evaluating your sales activity
 - Understanding the key sales ratios
 - The value of creating a sales plan
 - Developing a more strategic approach
- **Personal Action Plan—A Commitment to Positive Change**
 - Commitment to positive change
- **Seminar Summary**
 - Closing remarks & participant evaluation